



User Manual for the Activity Planning Module

Energy and Performance Information Center (EPIC)

U.S. Department of Housing and Urban Development

December 5, 2016



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1.0 ACTIVITY PLANNING MODULE TAB

The Activity Planning Module (APM) within HUD's Energy and Performance Information Center (EPIC) automates the development, submission, approval, and revision of Capital Fund Program (CFP) 5-Year Action Plans (Form HUD-50075.2), Budgets and Performance & Evaluation (P&E) Reports (Form HUD-50075.1).

From the EPIC homepage, the user will click on the Activity Planning Module tab that is listed in the row across the top of the page. Once a user selects the Activity Planning Module tab, the user may be presented with a window to select a Public Housing Authority (PHA). Once the user selects a PHA, they will be presented with the Activity Planning functions. See figures below.

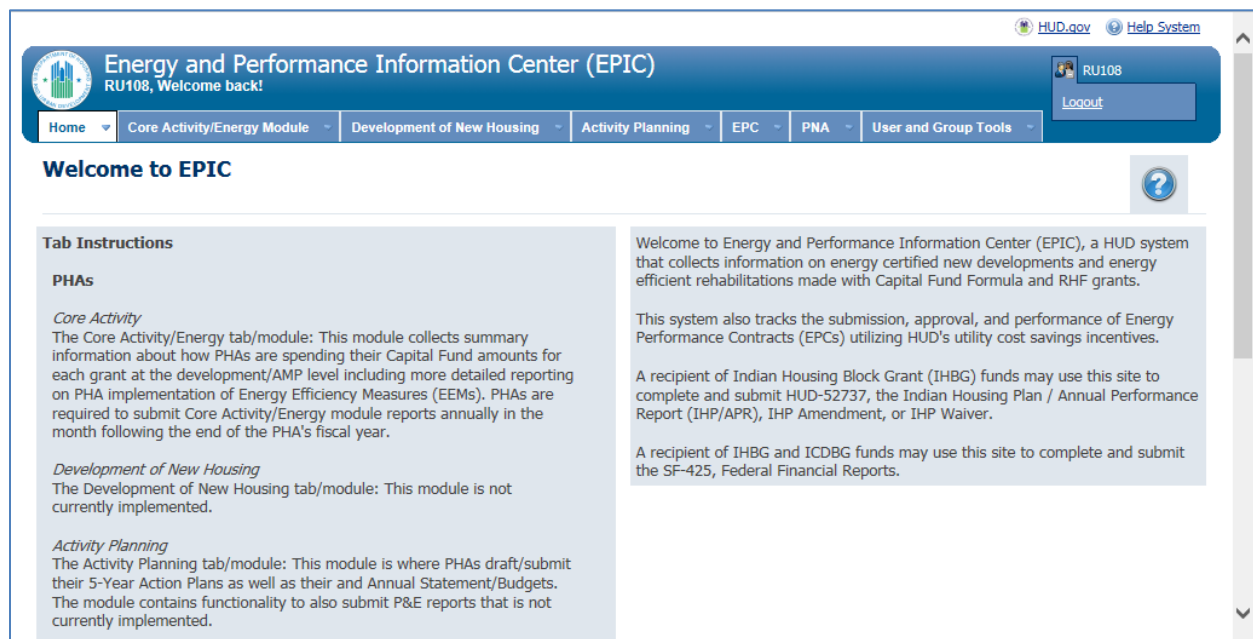


Figure 1: Activity Planning Module Tab Displayed at Top Center of EPIC Homepage



Figure 2: Select a PHA Window

Figure 3: 5-Year Action Plan within Activity Planning Functions

Under the heading “Activity Planning Functions”, users see two options:

- 5-Year Action Plan
- Annual Statement/Budget/P&E



1.1 5-Year Action Plan

Selecting “5-Year Action Plan” will take the user to the 5-Year Action Plan Reporting Homepage, from which the user can choose to create a new 5-Year Action Plan (5YAP) or edit an existing 5YAP.

The 5-Year Action Plan Reporting Home Page contains a legend which indicates the meaning of various symbols used on the page.

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5-Year Action Plan • Annual Statement/Budget/P&E

Selected PHA: [Change](#)

OMB CONTROL NUMBER: 2577-0274
EXPIRATION DATE: 03/31/2015

5YAP1 » 5-Year Action Plan Reporting

Legend

- » This plan has been submitted and cannot be edited
- » Create New
- » Edit Plan
- » Unsubmit Plan
- » Delete
- » Clone/Copy Forward
- » View
- » View PDF
- » Comments

Five Year Action Plan

Plan	Type	Created Date	Last Modified	Report Year	Status	Options
2015 5YAP is due on 04/17/2015, no report has been submitted yet						
5-Year Action Plan for 2013-2017	Rolling	05/11/2015	05/11/2015	2013-2017	Draft	

Figure 4: 5-Year Action Plan Reporting Page

1.1.1 Create New 5YAP

From the 5-Year Action Plan Reporting Homepage, to create a new 5YAP, users select the “Create New” icon next to the appropriate period. As the legend indicates, the icon looks like this:



Icon 1: Create New

If a 5YAP has already been created for the same time period, the user will receive a warning message indicating the action will result in creating a new 5YAP and the previous report will not be editable. Selecting “Cancel” will return the user to the 5-Year Action Plan Reporting



Homepage, while selecting “Continue” will direct the user to the 5 Year Action Plan Details page from which a new 5YAP can be created.

Figure 5: Confirm – Create Action Plan

The 5 Year Action Plan Details Page enables users to enter the following 5YAP Details:

- **Type of Plan:** Users select between Fixed Plan and Rolling Plan. Fixed Plans cover a static, five-year period; at the conclusion of this period, a new plan is created covering the next five-year period. Rolling Plans cover a rolling, five-year period; annually a new plan is created, removing the oldest year and adding on an additional year.

This selection cannot be edited once the plan has been created, so users should take care in making this selection. However, users may change their election upon creation of a new 5-Year Action Plan. For example, a PHA currently operating under a Fixed Plan may shift to a Rolling Plan with its next submission as long as the PHA continues to cover 5 years within the plan, including the current year. Small PHAs should refer to PIH Notice 2016-21 (see: <http://portal.hud.gov/hudportal/documents/huddoc?id=PIH-2016-21.pdf>) or the information on “Estimated Amounts by Plan Year” below for a discussion of the different flexibilities afforded under Fixed and Rolling Plans.

- **5 Year Action Plan Starting Year:** The starting year for the 5YAP. For example, entering a Starting Year of 2016 will create a plan from 2016 through 2020. Currently, users may be unable to edit the Starting Year for 5YAPs once they have been created, so users should take care to enter an accurate year in this field.

As PHAs transition to entering 5-Year Action Plans in EPIC, the 5-Year Action Plan Starting Year will vary depending upon the type of plan and period covered under the prior, paper-based plan. See PIH Notice 2016-21 (see: <http://portal.hud.gov/hudportal/documents/huddoc?id=PIH-2016-21.pdf>) for a detailed explanation on the transition schedule and period covered by initial plan submissions.



➤ Estimated Amounts by Plan Year:

In entering estimated amounts for each year of the 5-Year Action Plan, PHAs must enter for all future years the same amount received for the most recent grant year, subject to the following exceptions:

- PHAs must adjust estimated amounts for the expiration or reduction of eligibility for RHF and DDTF grants.
- PHAs that expect to borrow funds either through the Capital Fund Financing Program (CFFP) or an Energy Performance Contract (EPC) should include the expected proceeds in their estimates.
- PHAs anticipating other substantial influxes of funds (e.g., tax credit proceeds) should include these funds in their estimates.
- PHAs with RAD CHAP, portfolio, or multi-phase awards that plan to remove units from their public housing portfolio through RAD should deduct the estimated amount of the Capital Fund grant associated with the RAD project. This number should be the same as the estimate included in the PHA Plan or RAD Significant Amendment.
- PHAs with fewer than 250 Public Housing dwelling units ("Small PHAs") with Fixed Plans may choose to estimate that they will receive a larger grant amount in future years than in the current year, in order to include "standby" work activities in future years. For example, a PHA with a fixed plan and most recent grant amount of \$100,000 may enter estimated amounts of \$120,000 in years 4 and 5 of the 5-Year Action Plan in order to include standby items while keeping the expected revenue and expenses in balance. This option provides additional flexibilities to these Small PHAs.

This exception is not available to PHAs with Rolling Plans, as the nature of a Rolling Plan ensures that there will always be four years of future work activities available to fund, or reassign, to the current year.

These estimates may be edited at any time prior to plan submission by using the Edit Plan functionality on the 5-Year Action Plan Reporting Home Page.

While the 5 Year Action Plan Detail Page displays the PHA Fiscal Year End, this information cannot be edited. It is based on data reported through other HUD systems.



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• [5-Year Action Plan](#) • [Annual Statement/Budget/P&E](#)

Selected PHA: [Change](#)

OMB CONTROL NUMBER: 2577-0274
 EXPIRATION DATE: 03/31/2015

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5YAP2 » 5 Year Action Plan Details for

Please use the form below to enter 5 Year Action Plan Details.

5 Year Action Plan Details

1. Type of Plan: ☐ Fixed Plan ☒ Rolling Plan

2. Fiscal Year End:

3. 5 Year Action Plan Starting Year:

4. Estimated Amounts by Plan Year

Year 1:	<input type="text"/>
Year 2:	<input type="text"/>
Year 3:	<input type="text"/>
Year 4:	<input type="text"/>
Year 5:	<input type="text"/>
Total Estimated 5 Year Action Plan Amount: <input type="text" value="\$0.00"/>	

Figure 6: 5 Year Action Plan Details Page

Once the user has entered all necessary information on the 5 Year Action Plan Detail Page, the user selects “Save and Continue”.

Upon selecting “Save and Continue”, the user will be directed to the Activities List page.



1.1.2 Create New Work Activity

Once a user a new 5YAP has been created, users can then use the Activity List page to create new work activities. The “Create New Work Activity” button is at the bottom of the Activity List page.

For 5YAPs for which no work activities have yet been created, users may notice a yellow warning message indicating that the plan cannot be submitted because estimated amounts are greater than consumed amounts. As work activities are added for each year planning for how all estimated funds will be consumed, these messages will disappear.

Users create new work activities by selecting the “Create New Work Activity” button at the bottom of the Activities List page. This action navigates users to the Add Work Activity page.

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5-Year Action Plan - Annual Statement/Budget/P&E

Selected PHA: [Redacted] [Change](#)

OMB CONTROL NUMBER: 2577-0274
EXPIRATION DATE: 03/31/2015

5YAP3 » Activities List for [Redacted] - 2016 to 2020

5 Year Action Plan Activities page displays high level view of active work activities for this PHA.

[Go back to Plans Listing](#)
[Edit Plan Information](#)
[View PDF](#)

Piggy Bank

Year	Work Activity Cost		
	Estimated	Consumed	Balance
2016	\$100,000.00	\$0.00	\$100,000.00
2017	\$100,000.00	\$0.00	\$100,000.00
2018	\$100,000.00	\$0.00	\$100,000.00
2019	\$100,000.00	\$0.00	\$100,000.00
2020	\$100,000.00	\$0.00	\$100,000.00
Total	\$500,000.00	\$0.00	\$500,000.00

Legend

- [» Edit Work Activity](#)
- [» Clone Work Activity](#)
- [» Delete Work Activity](#)
- [» View Work Activity Log](#)

Work Activities
No work activities found based on search criteria.

The work activities and plan information has been saved. To add another work activity, click on 'Create New Work Activity' button. To funge work activities, click on 'Funge Work Activities' button. When all estimated amounts are consumed, the plan will be eligible for submission and a 'Submit Plan' button is displayed. You can submit the plan by clicking the 'Submit Plan' button. Once a plan is submitted, it will be locked and cannot be edited until Field Office approves or rejects the plan.

This plan cannot be submitted because:

- For Year 2016, estimated amount is greater than consumed amount.
- For Year 2017, estimated amount is greater than consumed amount.
- For Year 2018, estimated amount is greater than consumed amount.
- For Year 2019, estimated amount is greater than consumed amount.
- For Year 2020, estimated amount is greater than consumed amount.

[Create New Work Activity](#) [Funge Work Activities](#)
[Submit Plan](#)

Figure 7: Create New Work Activity Button on Activities list Page

The Add Work Activity page contains four sections: Work Activity Information, Affected Developments/AMPs, Component Categories from PNA, and Work Categories. Users can click links to expand the latter three sections.



HUD.gov Help System

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5-Year Action Plan Annual Statement/Budget/P&E

Selected PHA: [Redacted] OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 03/31/2015

5YAP4 » [Redacted] - 2016 to 2020 » Add Work Activity

A brief description of work activity detail.

Go back to Plan Details

Piggy Bank

Work Activity Cost			
Year	Estimated	Consumed	Balance
2016	\$100,000.00	\$0.00	\$100,000.00
2017	\$100,000.00	\$0.00	\$100,000.00
2018	\$100,000.00	\$0.00	\$100,000.00
2019	\$100,000.00	\$0.00	\$100,000.00
2020	\$100,000.00	\$0.00	\$100,000.00
Total	\$500,000.00	\$0.00	\$500,000.00

Work Activity Information

1. Title:

2. Description:

3. Cost:

4. Projected Year:

Affected Developments/AMPs [\(Click to Expand\)](#)

Component Categories from PNA [\(Click to Expand\)](#)

Work Categories [\(Click to Expand\)](#)

Save Cancel

Figure 8: Add Work Activity Page

- **Work Activity Information:** Users enter a Title, Description, Cost, and Projected Year for the Work Activity. In accordance with PIH Notice 2016-21 (see: <http://portal.hud.gov/hudportal/documents/huddoc?id=PIH-2016-21.pdf>), in entering Work Activity Information, PHAs must adhere to the following:
- PHAs planning to complete a work activity using force account labor must include the words “Force Account” in parentheses in the title of the work activity (e.g., “Roof Replacement at Main Street Development (Force Account)”). Should a PHA wish to complete an activity using force account labor that was not designated as such at the time of 5-Year Action Plan approval, or wish to complete an activity designated as force account at approval using another vehicle, the PHA user must copy or “clone” the work activity in EPIC, modify the title accordingly, and submit the activity for Field Office approval.
 - HUD will use PHAs’ selections in EPIC to update BLIs in LOCCS; therefore, it is imperative that each work activity be associated with a single BLI. In addition, each Work Activity must be associated with a single Projected Year and Development. PHAs must create multiple Work Activities for work items



combining funds across multiple grant years or spanning multiple developments. For example, if kitchens will be upgraded in 10 units, with 5 units upgraded using 2016 Capital Funds and 5 units upgraded using 2017 Capital Funds, the PHA user would enter a separate Work Activity for each year and reflect the costs separately. The Clone Work Activity feature described later in this manual can assist users in quickly copying work items that can then be modified to cover different years.

- The Work Item Description must provide sufficient specificity to facilitate effective HUD Field Office review of the plan, including enabling the Field Office to assess the level and type of environmental review required. PHAs are encouraged to enter information in the Description field on the scope of the activity (e.g., number of units impacted).

For example, for a work activity covering roof replacement at a particular development, a sufficient description may read: “Installing new 20-year roof, as well as gutters and soffits, at low-rise building containing 5 Public Housing units.” A work description simply stating “Roof” would be insufficient, because it does not indicate whether the activity will cover full-scale replacement of the roof or simply patching portions of the roof, a distinction with implications for the level and type of environmental review required.

- Affected Developments/AMPs: Once the Work Activity Information has been entered, users click the “Click to Expand” link next to “Affected Developments/AMPs”. Users will then view a list of development numbers and names along with ACC unit counts. In addition, users will see a record with a Development Number of “N/A”.

For each work activity, the user marks the radio button to the left of the development at which the activity will take place. For work not tied to a specific development (e.g., Administration), the user selects “N/A” for the Affected Developments/AMPs. For construction activities on a non-dwelling building or site (e.g., capital items at administrative offices), the user must select the specific development of which the site is a part; “N/A” should only be selected if the site is not contiguous to or included within a development. If a work item spans multiple developments, the user must create separate Work Activities. The Clone Work Activity feature described later in this manual can assist users in quickly copying work items that can then be modified to cover different years.



Affected Developments/AMPs (Click to Expand)			
5. Affected Developments/AMPs:			
	Development Number	Development Name	Total ACC Units
<input type="radio"/>	N/A	Not associated with any specific development	N/A
<input type="radio"/>	<input type="text" value="000101"/>	<input type="text" value=""/>	200
<input type="radio"/>	<input type="text" value="000102"/>	<input type="text" value=""/>	255
<input type="radio"/>	<input type="text" value="000103"/>	<input type="text" value=""/>	290
<input type="radio"/>	<input type="text" value="000104"/>	<input type="text" value=""/>	154
<input type="radio"/>	<input type="text" value="000105"/>	<input type="text" value=""/>	127

Figure 9: Expanded View of Affected Developments/AMPs on Add Work Activity Page

- **Component Categories from PNA:** This functionality is not yet available. Once implemented, it will enable users to select capital needs identified within a PHA's Physical Needs Assessment (PNA) and quickly add them to a 5YAP. In the interim, users will not see any component categories listed when they expand this section of the page, and no selections are needed.
- **Work Categories:** Upon clicking the "Click to Expand" link next to "Work Categories", users will see a listing of categories. Users will notice that some categories, such as "Dwelling Unit" are marked with a plus sign to the left of the category name; other categories, such as "Dwelling Unit – Conversion" are not marked with a plus sign. Users will also see that each work category name includes the Budget Line Item (BLI) in parentheses. These BLIs reflect the simplified BLI structure announced in PIH Notice 2016-21 (see: <http://portal.hud.gov/hudportal/documents/huddoc?id=PIH-2016-21.pdf>).

Users will select the appropriate Work Category and, if applicable, Sub-Category or Sub-Categories for each new work item. For example, if the Work Activity covers roof installation on a dwelling structure, the PHA would select "Dwelling Unit-Exterior (1480)" as the Work Category. As the Dwelling Unit-Exterior category is marked with a plus sign, the PHA user would expand the category and select the appropriate sub-categories as well—in this case, "Roofs", "Gutters - Downspouts", and "Soffits". These selections are displayed in Figure 10.

HUD will use PHAs' selections in EPIC to update BLIs in LOCCS; therefore, it is imperative that each Work Activity be associated with a single BLI. PHAs may select more than one Work Category for any Work Activity, provided that the Work Categories



do not fall under different BLIs. For example, a PHA user may select Dwelling Unit-Interior (1480) and Dwelling Unit-Exterior (1480), along with the applicable sub-categories, for a work item including both types of work in a single development and using a single year's grant. However, a user must not select both Dwelling Unit-Interior (1480) and Management Improvements (1408) because these Work Categories fall under different BLIs.



Work Categories (Click to Expand)	
7. Work Categories:	
+	<input type="checkbox"/> Administration (1410)
+	<input type="checkbox"/> Contract Administration (1480)
	<input type="checkbox"/> Debt Service Bond Payment-Paid by HUD (9000)
	<input type="checkbox"/> Debt Service Bond Payment-Paid by PHA (1501)
	<input type="checkbox"/> Dwelling Unit - Conversion (1480)
	<input type="checkbox"/> Dwelling Unit - Demolition (1480)
+	<input type="checkbox"/> Dwelling Unit-Development (1480)
-	<input checked="" type="checkbox"/> Dwelling Unit-Exterior (1480)
	<input type="checkbox"/> <i>Balconies-Porches-Railings-etc</i>
	<input type="checkbox"/> <i>Building Slab</i>
	<input type="checkbox"/> <i>Canopies</i>
	<input type="checkbox"/> <i>Carports -Surface Garage</i>
	<input type="checkbox"/> <i>Columns and Porches</i>
	<input type="checkbox"/> <i>Decks and Patios</i>
	<input type="checkbox"/> <i>Exterior Doors</i>
	<input type="checkbox"/> <i>Exterior Lighting</i>
	<input type="checkbox"/> <i>Exterior Paint and Caulking</i>
	<input type="checkbox"/> <i>Exterior Stairwells - Fire Escape</i>
	<input type="checkbox"/> <i>Foundations</i>
	<input checked="" type="checkbox"/> <i>Gutters - Downspouts</i>
	<input type="checkbox"/> <i>Landings and Railings</i>
	<input type="checkbox"/> <i>Mail Facilities</i>
	<input type="checkbox"/> <i>Other</i>
	<input checked="" type="checkbox"/> <i>Roofs</i>
	<input type="checkbox"/> <i>Siding</i>
	<input checked="" type="checkbox"/> <i>Soffits</i>

Figure 10: Screenshot of Portion of EPIC Add Work Activity Page, Displaying Work Categories and Sub-Categories



Upon entering all necessary information for the new work activity, the user clicks “Save”. If any required information is missing, the user will receive a message explaining which items are missing. If all items are complete, the work item will be saved. The user will then be returned to the Activities List page, where the new work item will appear. The “Piggy Bank” on the left side of the screen will then include the cost of the work activity under the “Consumed” cost for the given year.

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5-Year Action Plan Annual Statement/Budget/P&E Selected PHA: [redacted] OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 03/31/2015

5YAP3 » Activities List for [redacted] - 2016 to 2020

5 Year Action Plan Activities page displays high level view of active work activities for this PHA.

[Go back to Plans Listing](#)
[Edit Plan Information](#)
[View PDF](#)

Piggy Bank

Year	Work Activity Cost		
	Estimated	Consumed	Balance
2016	\$100,000.00	\$100,000.00	\$0.00
2017	\$100,000.00	\$0.00	\$100,000.00
2018	\$100,000.00	\$0.00	\$100,000.00
2019	\$100,000.00	\$0.00	\$100,000.00
2020	\$100,000.00	\$0.00	\$100,000.00
Total	\$500,000.00	\$100,000.00	\$400,000.00

Work Activities

Search for Work Activities records using a Year Range, Development/AMP, and/or Work Activity name

Years to View: [dropdown] - [dropdown]
Development/AMP: [dropdown]
Work Activity Name: [text input]
[Search] [Clear Search]

Year	Identifier	Dev/AMP	Activity	Amount	Options
2016	ID0001	[redacted]	Roof Installation	\$100,000.00	[edit icon] [refresh icon] [delete icon]

Figure 11: Activities List Page

1.1.3 Edit Work Activity

After a new work activity has been created, users can edit the work activity by selecting the Edit Work Activity Icon next to that particular work activity on the Activities List Page. The icon looks like this:



Icon 2: Edit Icon



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[Annual Statement/Budget/P&E](#)

Selected PHA:
[Change](#)

OMB CONTROL NUMBER: 2577-0274
 EXPIRATION DATE: 03/31/2015

5YAP3 » Activities List for - 2016 to 2020

5 Year Action Plan Activities page displays high level view of active work activities for this PHA.

[Go back to Plans Listing](#)
[Edit Plan Information](#)
[View PDF](#)

Piggy Bank

Year	Work Activity Cost		
	Estimated	Consumed	Balance
2016	\$100,000.00	\$100,000.00	\$0.00
2017	\$100,000.00	\$0.00	\$100,000.00
2018	\$100,000.00	\$0.00	\$100,000.00
2019	\$100,000.00	\$0.00	\$100,000.00
2020	\$100,000.00	\$0.00	\$100,000.00
Total	\$500,000.00	\$100,000.00	\$400,000.00

Work Activities
 Search for Work Activities records using a Year Range, Development/AMP, and/or Work Activity name
 Years to View: -
 Development/AMP:
 Work Activity Name:

Year	Identifier	Dev/AMP	Activity	Amount	Options
2016	ID0001	<input type="text"/>	Roof Installation	\$100,000.00	

Figure 12: Activities List page – Edit Work Activities Icon

Upon selecting the “Edit” icon on the Activities List page, the user can make edits to the work activity via the Edit Work Activity Page. To edit the Affected Development/AMPs, Component Categories from PNA, or Work Categories sections, the user will need to select the link to expand the appropriate section. The user will select “Save” to update the work activity information. Note that once the 5YAP has been submitted to HUD, and once work activities have been connected to a Budget in EPIC, options for editing work activities become more limited.



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[5-Year Action Plan](#) | [Annual Statement/Budget/P&E](#)

Selected PHA: [Change](#)

OMB CONTROL NUMBER: 2577-0274
 EXPIRATION DATE: 03/31/2015

5YAP4 » **- 2016 to 2020 » Edit Work Activity**
(ID0001)

A brief description of work activity detail.

[Go back to Plan Details](#)

Piggy Bank

Work Activity Cost			
Year	Estimated	Consumed	Balance
2016	\$100,000.00	\$100,000.00	\$0.00
2017	\$100,000.00	\$0.00	\$100,000.00
2018	\$100,000.00	\$0.00	\$100,000.00
2019	\$100,000.00	\$0.00	\$100,000.00
2020	\$100,000.00	\$0.00	\$100,000.00
Total	\$500,000.00	\$100,000.00	\$400,000.00

Work Activity Information

1. Title:

2. Description:

3. Cost:

4. Projected Year:

Affected Developments/AMPs [\(Click to Expand\)](#)

Component Categories from PNA [\(Click to Expand\)](#)

Figure 13: Edit Work Activity Page

1.1.4 Clone Work Activity

After a new work activity has been created, users can create a copy, or clone, of the work activity. Users may find this option helpful in cases where the same or similar work is being done across multiple developments or years. For example, suppose a work activity was created for roof installation in 2016 in development AB123000001. If roof installation will also be done in 2016 in development AB123000002, the user may wish to copy the existing work activity and then edit the copy to change the development number and cost, as needed.

Users create a copy of an existing work activity by selecting the Clone Work Activity Icon next to that particular work activity on the Activities List Page. The icon looks like this:



Icon 3: Clone Icon

Upon selecting the Clone Work Activity Icon next to a particular work activity, the user will receive a message asking to confirm the action.

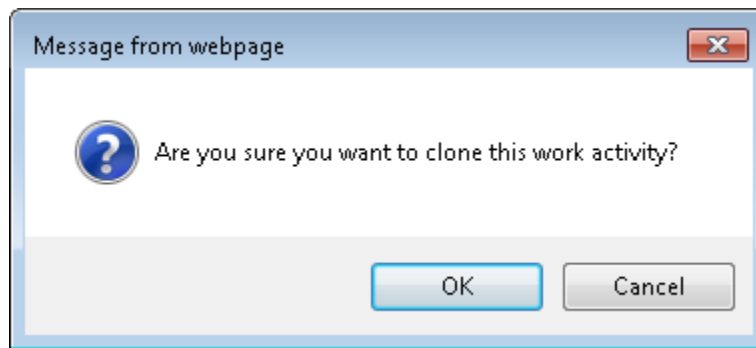


Figure 14: Clone Work Activity Confirmation

Upon selecting “OK”, the user will see that a copy of the existing work activity has been added to the Activity List Page. The “Piggy Bank” on the left side of the Activity List Page will have adjusted accordingly.

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Home | Core Activity/Energy Module | Development of New Housing | **Activity Planning** | EPC | PNA | User and Group Tools

5-Year Action Plan | Annual Statement/Budget/P&E | Selected PHA: [] | OMB CONTROL NUMBER: 2577-0274 | EXPIRATION DATE: 03/31/2015

5YAP3 » Activities List for [] - 2016 to 2020

5 Year Action Plan Activities page displays high level view of active work activities for this PHA.

[Go back to Plans Listing](#)
[Edit Plan Information](#)
[View PDF](#)

Piggy Bank

Work Activity Cost			
Year	Estimated	Consumed	Balance
2016	\$100,000.00	\$200,000.00	-\$100,000.00
2017	\$100,000.00	\$0.00	\$100,000.00
2018	\$100,000.00	\$0.00	\$100,000.00
2019	\$100,000.00	\$0.00	\$100,000.00
2020	\$100,000.00	\$0.00	\$100,000.00
Total	\$500,000.00	\$200,000.00	\$300,000.00

Work Activities

Search for Work Activities records using a Year Range, Development/AMP, and/or Work Activity name

Years to View: [] - []
Development/AMP: []
Work Activity Name: []

[Search] [Clear Search]

Year	Identifier	Dev/AMP	Activity	Amount	Options
2016	ID0001	[]	Roof Installation	\$100,000.00	[] [] []
2016	ID0002	[]	Copy of Roof Installation	\$100,000.00	[] [] []

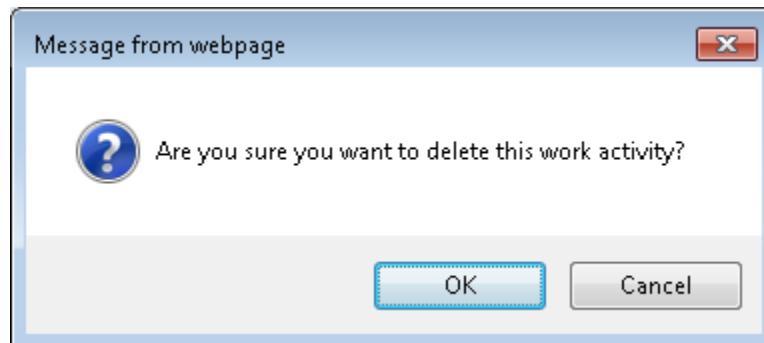
Figure 15: Clone of Work Activity on Activities List Page

1.1.5 Delete Work Activity

Users can delete an existing work activity by selecting the Delete Work Activity Icon next to the particular work activity on the Activities List Page. The icon looks like this:

**Icon 4: Delete Icon**

Upon selecting the “Delete Work Activity” icon, users will receive a popup message confirming the action.

**Figure 16: Delete Work Activity Confirmation**

Upon selecting “OK”, users will be returned to the Development List page, and the deleted work activity will no longer be displayed. The “Piggy Bank” on the left side of the Activity List Page will have adjusted accordingly.

1.1.6 Work Activity Log

Users can select the Work Activity Log icon to see a history including when the work activity was created, edited, and copied/cloned, and the user ID of the user who entered these actions. The icon looks like this:

**Icon 5: Log Icon**

Upon selecting the Work Activity Log icon for a particular work activity, a log similar to that shown below will be displayed.

Work Activity Log for ID0001		
Activity	Performed By	Activity Date
Work Activity has been cloned to create a copy as ID0002	RU108	07/10/2015
Work Activity has been created	RU108	07/10/2015

Figure 17: Work Activity Log



1.1.7 Funge Work Activities

For work activities that are not yet connected to a Budget in EPIC, users can move the work activity from one year to another through the Edit Work Item functionality. However, once work items are connected to a Budget in EPIC, moving work items between years requires users to utilize the Funge Work Items functionality.

In order to fungue work activities between years, users select the Funge Work Activities button at the bottom of the Activity List Page.

Energy and Performance Information Center (EPIC)
RU108, Welcome back!

Home | Core Activity/Energy Module | Development of New Housing | Activity Planning | EPC | PNA | User and Group Tools

5-Year Action Plan | Annual Statement/Budget/P&E | Selected PHA: [Redacted] | OMB CONTROL NUMBER: 2577-0274 | EXPIRATION DATE: 03/31/2015

SYAP3 » Activities List for [Redacted] - 2016 to 2020

5 Year Action Plan Activities page displays high level view of active work activities for this PHA.

[Go back to Plans Listing](#)
[Edit Plan Information](#)
[View PDF](#)

Piggy Bank			
Year	Work Activity Cost		
	Estimated	Consumed	Balance
2016	\$100,000.00	\$0.00	\$100,000.00
2017	\$100,000.00	\$0.00	\$100,000.00
2018	\$100,000.00	\$0.00	\$100,000.00
2019	\$100,000.00	\$0.00	\$100,000.00
2020	\$100,000.00	\$0.00	\$100,000.00
Total	\$500,000.00	\$0.00	\$500,000.00

Legend

- » Edit Work Activity
- » Clone Work Activity
- » Delete Work Activity
- » View Work Activity Log

Work Activities
No work activities found based on search criteria.

The work activities and plan information has been saved. To add another work activity, click on 'Create New Work Activity' button. To fungue work activities, click on 'Funge Work Activities' button. When all estimated amounts are consumed, the plan will be eligible for submission and a 'Submit Plan' button is displayed. You can submit the plan by clicking the 'Submit Plan' button. Once a plan is submitted, it will be locked and cannot be edited until Field Office approves or rejects the plan.

This plan cannot be submitted because:

- For Year 2016, estimated amount is greater than consumed amount.
- For Year 2017, estimated amount is greater than consumed amount.
- For Year 2018, estimated amount is greater than consumed amount.
- For Year 2019, estimated amount is greater than consumed amount.
- For Year 2020, estimated amount is greater than consumed amount.

Create New Work Activity | Funge Work Activities | Submit Plan

Figure 18: Funge Work Activity Button on Activities list Page

Upon selecting the Funge Work Activities button, users are directed to the Funge Work Activities page. On this page, users will first select the Source Year. This is the year from which the work activity is moving. Upon selecting a Source Year, the work activities currently listed in that Source Year are displayed. Users check the work item or items they would like to move and select “Add to Queue”. The work item(s) selected then appear in the queue.

Note that multiple items from the same Source Year may be selected and added to the queue. In addition, once work items from one Source Year are selected and added to the queue, users may



then select another Source Year and add items from that Source Year to the queue. Therefore, the queue may include multiple work items, including multiplying work items from different Source Years.

Once all items to be moved to a new Fiscal Year are displayed in the queue, the user selects “Continue”.

5YAP6 » Funge Work Activities

1 Select Work Activities from Source Year
2 Select Destination for Work Activities
3 Review Work Activity Fungibility
4 Summary of Completed Fungibility Actions

Piggy Bank

Year	Estimated Amount	Current Planned Amount
2016	\$100,000.00	\$100,000.00
2017	\$100,000.00	\$100,000.00
2018	\$100,000.00	\$0.00
2019	\$100,000.00	\$0.00
2020	\$100,000.00	\$0.00

Please select a year to start the work activity organization process.

To start, select a Source Year to see a list of fungible work activities. The list will be displayed in the Source Work Activities table. You can change the Source Year at anytime, including after you add work activities to the queue.

Select Source Year: 2016 ▼

Source Work Activities

Select the desired work activities by using the check box and clicking on the Add to Queue button.

	Identifier	Development/AMP	Activity	Amount	Annual Statement/Budget
<input type="checkbox"/>	ID0001		Roof Installation	\$100,000.00	2016

Add To Queue ▼

Work Activities Queued for Fungibility

The queue displays a list of selected work activities to be funged. To remove a work activity, use the Remove link for the desired work activity.

Year	Identifier	Development/AMP	Activity	Amount	Annual Statement/Budget
There are no work activities in the queue.					

Continue Cancel

Figure 18: Funge Work Activities-Select Work Activities from Source Year

Upon selecting Continue from the Funge Work Activities Page, the user will be directed to a new webpage listing the queued work items. The user selects a Destination Year. This is the year into which the work item is moving. The user then selects a work item or work items and selects the Funge button to move the work item(s) to the Destination Year. If the user has added multiple work items to the Funge Work Items Queue, the user can then select another Destination Year and repeat the process to funged work items to that Destination Year. Funged Work Items appear in the table at the bottom of the screen. Once the user has funded all queued work items to a new Destination Year, the user selects “Continue”.



5YAP7 » Funge Work Activities



- 1** Select Work Activities from Source Year
- 2** Select Destination for Work Activities
- 3** Review Work Activity Fungibility
- 4** Summary of Completed Fungibility Actions

Piggy Bank

Year	Estimated Amount	Current Planned Amount	Amount Change
2016	\$100,000.00	\$100,000.00	\$0.00
2017	\$100,000.00	\$100,000.00	\$0.00
2018	\$100,000.00	\$0.00	\$0.00
2019	\$100,000.00	\$0.00	\$0.00
2020	\$100,000.00	\$0.00	\$0.00

Select the destination year and fungue the appropriate work activities to associate with that destination year. This process can be performed on one or more work activities and repeated as needed until all work activities are funged.

Select a Destination Year. This will allow destination options to appear within the Work Activities Queued for Fungibility table. You can change the Destination Year at any time, including after you Funge Work Activities.

Select Destination Year: 2016 ▼

Work Activities Queued for Fungibility

Select the desired work activities by using the check box. Select the desired destination year or Annual Statement/Budget by using the To drop down box. Click on the Funge button to perform the fungibility action which will move the work activity to the Funged Work Activities table.

	Identifier	Development/AMP	Activity	Amount	From	To	
<input type="checkbox"/>	ID0001		Roof Installation	\$100,000.00	2016	▼	Remove
<input type="checkbox"/>	ID0003		Roof Installation	\$100,000.00	2017	2016 ▼	Remove

Funge ▼

Funged Work Activities

The list of Funged Work Activities displays the fungibility actions currently selected. To remove a work activity, use the Remove link for the desired work activity.

Identifier	Development/AMP	Activity	Amount	From	To	
------------	-----------------	----------	--------	------	----	--

There have be no work activities selected.

Back Continue Cancel

Figure 19: Funge Work Activities-Select Destination for Work Activities

Upon funging activities to a new Destination Year and selecting Continue, the user will be directed to a summary/confirmation page. This page includes a “Piggy Bank” showing the current amounts and the changes that would be applied as a result of funging work activities. It also displays a summary of the fungibility actions (i.e., a list of work activities and the years in which they are moving *from* and *to*.) If the user needs to make changes, they may select the Back or Cancel buttons. To complete the fungibility actions, the users selects Complete.



5YAP8 » Funge Work Activities

1 Select Work Activities from Source Year
2 Select Destination for Work Activities
3 **Review Work Activity Fungibility**
4 Summary of Completed Fungibility Actions

Year	Estimated Amount	Current Planned Amount	Amount Change	Planned Amount After Funge
2016	\$100,000.00	\$100,000.00	-\$100,000.00	\$0.00
2017	\$100,000.00	\$100,000.00	-\$100,000.00	\$0.00
2018	\$100,000.00	\$0.00	\$100,000.00	\$100,000.00
2019	\$100,000.00	\$0.00	\$100,000.00	\$100,000.00
2020	\$100,000.00	\$0.00	\$0.00	\$0.00

Please review the summary of changes resulting from the organization of work activities.

Work Activities

Please review the work activities changes resulting from this organization.

Identifier	Development/AMP	Activity	Amount	From	To
ID0001		Roof Installation	\$100,000.00	2016	2018
ID0003		Roof Installation	\$100,000.00	2017	2019

Fungibility Actions

Please review the actions resulting from this organization.

- Move Activity ID0001 (Roof Installation) from 2016 to 2018
- Move Activity ID0003 (Roof Installation) from 2017 to 2019

Back Complete Cancel

Figure 20: Funge Work Activities - Review Work Activity Fungibility

Upon selecting “Complete”, the user views another summary page with a link to return to the Activity List page.

5YAP9 » Funge Work Activities

1 Select Work Activities from Source Year
2 Select Destination for Work Activities
3 Review Work Activity Fungibility
4 **Summary of Completed Fungibility Actions**

The following list shows a summary of the completed fungibility actions and any associated reports that have changed. Use the links within the actions list to view the affected Annual Statements/Budget.

Summary

Action Summary	
1	Activity ID0001 (Roof Installation) was moved from 2016 to 2018
2	Activity ID0003 (Roof Installation) was moved from 2017 to 2019

Return to Activity List

Figure 21: Funge Work Activities – Summary of Completed Fungibility Actions

1.1.8 Submit Plan

From the Activities List Page, users can select the “View PDF” link on the left side of the page above the Piggy Bank to view a PDF of their plan. This facilitates saving copies of the plan



outside of the EPIC system and printing the plan. This option is available for 5YAPs in all statuses, whether Draft, Submitted, or Approved. It is available to both PHA and HUD users.

Once all work activities have been added and the cost of those work activities matches the estimated cost for each year of the 5YAP, the user may submit the 5YAP for HUD approval.

Note that the plan may not be submitted until the “Piggy Bank” on the Activity List Page shows balanced estimated revenues and expenses. The Piggy Bank is in balance when the Estimated and Consumed costs match for each year and the Balance for each year is \$0.00. If the Piggy Bank is out of balance, adjustments may be made on the revenue side by editing projected amounts for each year. To make these changes, select the “Edit Plan Information” link on the Activity List page above the Piggy Bank. Adjustments may also be made to the cost estimates by editing work activities or funding work activities.

Once the Piggy Bank is in balance, yellow warning messages will no longer appear at the bottom of the Activity List Page and the Submit button at the bottom of the Activity List Page will be activated. Note that once a 5YAP is submitted, it will be locked and cannot be edited until the Field Office approves or rejects the plan.



5YAP3 » Activities List for **- 2016 to 2020** ?

5 Year Action Plan Activities page displays high level view of active work activities for this PHA.

[Go back to Plans Listing](#)

[Edit Plan Information](#)

[View PDF](#)

Work Activities

Search for Work Activities records using a Year Range, Development/AMP, and/or Work Activity name

Years to View: -

Development/AMP:

Work Activity Name:

Year	Identifier	Dev/AMP	Activity	Amount	Options
2016	ID0004		Roof Installation	\$100,000.00	
2017	ID0005		Roof Installation	\$100,000.00	
2018	ID0001		Roof Installation	\$100,000.00	
2019	ID0003		Roof Installation	\$100,000.00	
2020	ID0006		Roof Installation	\$100,000.00	

Piggy Bank

Year	Work Activity Cost		
	Estimated	Consumed	Balance
2016	\$100,000.00	\$100,000.00	\$0.00
2017	\$100,000.00	\$100,000.00	\$0.00
2018	\$100,000.00	\$100,000.00	\$0.00
2019	\$100,000.00	\$100,000.00	\$0.00
2020	\$100,000.00	\$100,000.00	\$0.00
Total	\$500,000.00	\$500,000.00	\$0.00

Legend

- » Edit Work Activity
- » Clone Work Activity
- » Delete Work Activity
- » View Work Activity Log
- » Submitted Annual Statement/Budget
- » Draft Annual Statement/Budget
- » Approved Work Activity

The work activities and plan information has been saved. To add another work activity, click on 'Create New Work Activity' button. To funge work activities, click on 'Funge Work Activities' button. When all estimated amounts are consumed, the plan will be eligible for submission and a 'Submit Plan' button is displayed. You can submit the plan by clicking the 'Submit Plan' button. Once a plan is submitted, it will be locked and cannot be edited until Field Office approves or rejects the plan.

Figure 22: Activities List Page – Submit Plan Button

Upon selecting “Submit”, users will receive a popup message.

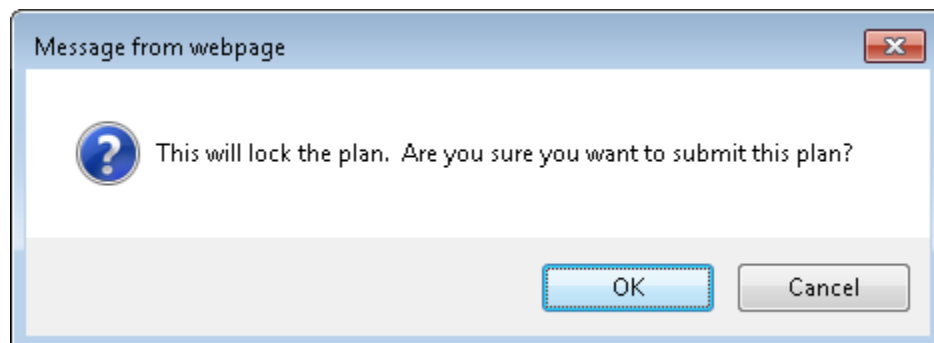


Figure 23: Submit Plan Confirmation



Upon selecting “OK”, the user will be directed to the 5-Year Action Plan Reporting Page. The 5-Year Action Plan will be displayed with a lock icon, indicating the plan has been submitted and cannot be edited.

The screenshot shows the EPIC interface. The top navigation bar includes links for Home, Core Activity/Energy Module, Development of New Housing, Activity Planning, EPC, PNA, and User and Group Tools. The user is logged in as RU108. The main content area is titled "5YAP1 » 5-Year Action Plan Reporting". On the left is a legend with options: "This plan has been submitted and cannot be edited" (with a lock icon), "Create New", "Edit Plan", "Unsubmit Plan", "Delete", "Clone/Copy Forward", "View", "View PDF", and "Comments". The main table, titled "Five Year Action Plan", has columns: Plan, Type, Created Date, Last Modified, Report Year, Status, and Options. A single row is shown for the "5-Year Action Plan for 2016-2020" with a lock icon, Type "Fixed", Created Date "07/09/2015", Last Modified "07/10/2015", Report Year "2016-2020", Status "Submitted", and Options for viewing and downloading.

Plan	Type	Created Date	Last Modified	Report Year	Status	Options
5-Year Action Plan for 2016-2020	Fixed	07/09/2015	07/10/2015	2016-2020	Submitted	View PDF, Download

Figure 24: 5-Year Action Plan Reporting Page Showing Submitted 5YAP

1.1.9 FO Staff Recommend Approval/Recommend Approval Withheld for a 5YAP Report

Field Office Staff members are authorized to Recommend Approval or Recommend Approval Withheld for a submitted 5YAP Report.

Upon logging in to EPIC, the Field Office user navigates to the Dashboard tab and selects 5-Year Action Plan – Tracking under Dashboard Functions. PHA users will not see this “Dashboard” tab displayed, as this functionality is reserved for HUD users.



Energy and Performance Information Center (EPIC)
RU104, Welcome back!

Home - Core Activity/Energy Module - Development of New Housing - Activity Planning - IHP/APR - SF425 - EPC - PNA

Dashboard Reports - User and Group Tools - Admin - Data Export

• [5 Year Action Plan - Tracking](#) • [Annual Statement / Budget / P&E](#) • [Core Activity](#) • [IHP/APR Report](#)

DB1 » Home Page - Dashboard

The Dashboard module can be used to facilitate tracking reports within EPIC at a high level using statuses such as Submitted, Under Review, Approved, and Reports Due. The Dashboards support downloadable spreadsheets for offline use and printing. This module can also be used to locate reports as there are links back to reports in each of the Dashboard lists.

Dashboard Functions

- [5 Year Action Plan - Tracking](#)
- [Annual Statement/Budget/P&E](#)
- [Core Activity](#)
- [IHP/APR Report](#)

Figure 25: 5-Year Action Plan - Tracking Dashboard Function

The Field Office user is then directed to the 5 Year Action Plan – Tracking Dashboard page. The Field Office user may select the “Search by PHA Code” link to search for the 5YAP of a particular PHA. Alternatively, the Field Office User may use the options on this page to select the Field Office or make other selections. In addition, the Field Office user may choose to filter the list to display only 5YAPs in a certain status. Upon locating a 5YAP, the Field Office user may select the View link to view the 5YAP.



Energy and Performance Information Center (EPIC)
RU104, Welcome back!

Home Core Activity/Energy Module Development of New Housing Activity Planning IHP/APR SF425 EPC PNA

Dashboard Reports User and Group Tools Admin Data Export

DB2 » 5 Year Action Plan - Tracking Dashboard

Search by PHA Code

Field Offices: Hub Office

PHA Fiscal Year: ALL

PHA Fiscal Year End: ALL

Include 5 Year Action Plans: ☐ Original ☐ Revisions ☒ Both

5 Year Action Plans List Filter

All (30) Submitted to FO (1) Under Review by FO Staff (0) Approved (5) Approval Withheld (0) Action Plans Due (16)

Submitted 5 Year Action Plans

Show 10 entries

HA Code	Action Plan Detail	Report Status	Total Estimated Amount	Submit/Due Date	Action
	5-Year Action Plan for 2016-2020	Submitted	\$500,000.00	N/A	View

Figure 26: Tracking Dashboard Filtered for FO and Submitted Status

When viewing a 5YAP, Field Office users will be able to select work activities to view the details of each item. In addition, Field Office users will be able to select the “View Work Activity Log” icon next to work activities to see information on their history. Field Office user may not add or edit work items or fungue work items between years.

Field Office users will see options displayed to add comments. The View/Add Comment link facilitates communications between HUD and the PHA; comments entered via this link are sent to the PHA. The Internal Comments link facilitates communication within HUD, between HUD staff.

Field Office users will see links displayed on the Activities List page to Recommend Approval or Recommend Approval Withheld. Refer to PIH Notice 2016-21 (see: <http://portal.hud.gov/hudportal/documents/huddoc?id=PIH-2016-21.pdf>) for guidance on HUD review and approval of 5YAPs in EPIC.



Energy and Performance Information Center (EPIC)
 RU103, Welcome back!

[Home](#) - [Core Activity/Energy Module](#) - [Development of New Housing](#) - [Activity Planning](#) - [IHP/APR](#) - [SF425](#) - [EPC](#) - [PNA](#) - [Dashboard](#)

[Reports](#) - [User and Group Tools](#)

[5-Year Action Plan](#) • [Annual Statement/Budget/P&E](#)

OMB CONTROL NUMBER: 2577-0274
 EXPIRATION DATE: 03/31/2015

5YAP3 » Activities List for [REDACTED] **- 2015 to 2019**

5 Year Action Plan Activities page displays high level view of active work activities for this PHA.

[Go back to Plans Listing](#)
[View PDF](#)

Piggy Bank

Work Activity Cost			
Year	Estimated	Consumed	Balance
2015	\$260,000.00	\$260,000.00	\$0.00
2016	\$260,000.00	\$260,000.00	\$0.00
2017	\$260,000.00	\$260,000.00	\$0.00
2018	\$260,000.00	\$260,000.00	\$0.00
2019	\$260,000.00	\$260,000.00	\$0.00
Total	\$1,300,000.00	\$1,300,000.00	\$0.00

Legend

- » Edit Work Activity
- » Clone Work Activity
- » Delete Work Activity
- » View Work Activity Log
- » Submitted Annual Statement/Budget
- » Draft Annual Statement/Budget
- » Approved Work Activity

[View/Add Comment](#)
[Internal Comments](#)

Work Activities
 Search for Work Activities records using a Year Range, Development/AMP, and/or Work Activity name
 Years to View: -
 Development/AMP:
 Work Activity Name:

Year	Identifier	Dev/AMP	Activity	Amount	Options
2015	ID0001		Admin 2015	\$25,000.00	
2015	ID0007		Frazier Village Window Replacement	\$201,000.00	
2015	ID0011		Frazier Air conditioning upgrade	\$34,000.00	
2016	ID0002		Admin 2016	\$26,000.00	
2016	ID0006		Roof replacement - Grant View Cherry Court	\$200,000.00	
2016	ID0012		Fort Cumberland Air conditioning upgrade	\$34,000.00	
2017	ID0003		Admin 2017	\$26,000.00	
2017	ID0008		Fort Cumberland Window Replacement	\$200,000.00	

Figure 27: View of Activities List Page for Field Office Staff

Upon selecting the Recommend Approval or Recommend Approval Withheld button, a Field Office user will see a screen displayed on which to confirm the action and enter comments. Field Office users are required to enter a comment when recommending that the FO Director withhold approval of a 5-Year Action Plan.



Amount	Options
\$1,000.00	[icon]
\$1,000.00	[icon]
\$1,000.00	[icon]
\$1,000.00	[icon]
\$1,000.00	[icon]
\$10,000.00	[icon]

Figure 28: FO Staff Recommend Approval of 5YAP and Enter Comments

The Field Office Directors are authorized to approve or withhold approval for 5YAPs. The Field Office Director logs into EPIC and navigates to the 5YAP by using the Dashboard functionality as described above. When viewing a 5YAP, the recommendation by Field Office staff is displayed just above the Approve/ Approval Withheld buttons.

If approval is withheld, the Field Office Director will be required to enter a comment. The 5YAP will then become unlocked so that the PHA can fix the problem in the 5YAP and re-submit it to HUD for approval.

1.2 Annual Statement/Budget/P&E

Once a PHA has an approved 5-Year Action Plan, the next step in the process is to create a Budget (formerly referred to as an Annual Statement). The approved 5YAP becomes the basis for Budget reporting within EPIC. The Budget can only be created once a 5YAP has been approved, and it will be linked to the approved plan.

The Budget will consist only of approved Work Activities from the 5-Year Action Plan. PHAs will select Work Activities from the applicable year of their 5-Year Action Plan to add to the Budget. In addition, PHAs may import approved work activities from other years of the 5-Year Action Plan into the Budget; PHAs may use this option if they have had a change of plans and would like to complete the activities included in the 5-Year Action Plan in a different order, shifting some activities between years.

Selecting Annual Statement/Budget/P&E from the Activity Planning Module homepage will direct the user to the Annual Statement /Budget Reporting Page.



The screenshot displays the Energy and Performance Information Center (EPIC) interface. At the top, there is a navigation bar with links to Home, Core Activity/Energy Module, Development of New Housing, Activity Planning, EPC, PNA, and User and Group Tools. The 'Activity Planning' module is selected, showing links for '5-Year Action Plan' and 'Annual Statement/Budget/P&E'. A green arrow points to the 'Annual Statement/Budget/P&E' link. The page also includes a Paperwork Reduction Act statement and a 'Selected PHA' dropdown menu. The OMB Control Number is 2577-0274, and the Expiration Date is 03/31/2015.

Figure 29: Annual Statement/Budget/P&E Function of Activity Planning Module

The Annual Statement/Budget Reporting Page enables a user to create a new Budget, associate a Budget with a grant award, and edit and submit Budgets. These functions will be detailed in the following sections.

1.2.1 Create a New Annual Statement/Budget

To create a new Budget, users select the Create New Annual Statement/Budget link on the Annual Statement/Budget Reporting Page. This option will not be available if the PHA does not yet have an approved 5YAP in EPIC.



Energy and Performance Information Center (EPIC)
RU108, Welcome back!

Home - Core Activity/Energy Module - Development of New Housing - Activity Planning - EPC - PNA - User and Group Tools

5-Year Action Plan • Annual Statement/Budget/P&E

Selected PHA: [Change](#)

OMB CONTROL NUMBER: 2577-0274
EXPIRATION DATE: 03/31/2015

AS1 » Annual Statement/Budget Reporting

This page lists the awards for which Annual Statements/Budget are created. This page also allows users to create new Annual Statements/Budget.

Awards with Annual Statements/Budget

This section displays the awards that have Annual Statements/Budget.

Please enter search criteria. A cumulative search is performed including all parameters provided.

Award Number:

Award Year:

[Clear Search Results](#)

Awards with Annual Statements/Budget List

Award Year	Award ID	Award Amount (HUD Obligation)	Annual Statement/Budget
No awards found.			

Annual Statements/Budget not associated with Awards

This table lists all the annual statements/Budget that are not associated with an award. Click on 'Assign to Award' link to associate corresponding annual statement/Budget with an award.

Annual Statements/Budget not associated with Awards List

Show entries

Search:

Title	Create Date	Last Modified	Report Year	Status	Options
No Annual Statement/Budget reports found.					

Showing 1 to 1 of 1 entries

[Previous](#) [Next](#)

Figure 30: Annual Statement/Budget Reporting Screen – Create New Annual Statement/Budget Button

Upon selecting the Create New Annual Statement/Budget button, users will be directed to a new page on which they will enter the following pieces of information:

- **Title:** The title for the Budget. This title may refer to the grant award or funding source and the year (e.g., 2015 Formula Grant)
- **5YAP Year:** Indicate to which 5YAP year the Budget corresponds.
- **Award and Estimated Award Amount:** At the time of creation of a new Budget, the PHA may or may not have received the Capital Fund grant or other source of funding for the year specified.

If the Capital Fund grant for the year selected has been received, the user selects the award from the Select Award drop-down box. This grant information is pre-populated from LOCCS. If a grant award is selected, the amount will be automatically displayed in the Estimated Award Amount box and cannot be edited. An example is shown in Figure 31 below.



If the Capital Fund Award for the selected year has not yet been received, the user may proceed in creating the Budget using an estimated award amount. In this case, selecting the arrow in the Select Award box will display a message stating “No Awards Found”. The user will leave that message in the Award box and will enter an Estimated Award Amount. This estimate will likely match the estimate entered in the approved 5YAP. An example is shown in Figure 32 below. Once the grant award is received, the PHA will link the Budget to the award in EPIC; HUD will not spread the budget in LOCCS, and the PHA may not draw down funds, until the Budget in EPIC is linked to the grant award.

AS5 » Create New Annual Statement/Budget

1 Select Award Year and Award 2 Select Work Activities

Annual Statement/Budget Information

1. Title: 2014 Formula Grant

2. Fiscal Year End: 06/30

3. SYAP Year: 2014

Award Information:

4. Select Award: 50114 - \$95,052.00

5. Estimated Award Amount: \$95,052.00

Continue Cancel

Figure 31: Create New Annual Statement/Budget – Select Award Year and Award

AS5 » Create New Annual Statement/Budget

1 Select Award Year and Award 2 Select Work Activities

Annual Statement/Budget Information

1. Title: 2015 Formula Grant

2. Fiscal Year End: 06/30

3. SYAP Year: 2015

Award Information:

4. Select Award: No Awards Found

5. Estimated Award Amount: 100000

Continue Cancel

Figure 32: Create New Annual Statement/Budget – Enter Estimated Award Amount



Upon selecting Continue, users will be directed to a new page on which they will select the work activity or activities for the Budget. The work activities listed will be those for the selected year in the approved 5YAP. The user will then select the Complete button at the bottom to create the new Budget.

Energy and Performance Information Center (EPIC)
RU108, Welcome back!

Home Core Activity/Energy Module Development of New Housing Activity Planning EPC PNA User and Group Tools

5-Year Action Plan Annual Statement/Budget/P&E Selected PHA: Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 03/31/2015

AS6 » Create New Annual Statement/Budget

1 Select Award Year and Award 2 Select Work Activities

Piggy Bank		
AS Amount	WA Planned Amount	Balance
\$100,000.00	\$0.00	\$100,000.00

2015 Work Activities from 5YAP 2014-2018			
Identifier	Dev/AMP	Activity	Amount
<input type="checkbox"/> ID0004		Roof installation	\$200,000.00

Back Complete Cancel

Figure 32: Create New Annual Statement/Budget – Select Work Activities

1.2.2 Import Work Activities

Once a Budget is created, the user will be directed to Activity List for Annual Statement/Budget Page.

The user may select the Import Work Activities button at the bottom of the screen to import work activities from other years.



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Selected PHA: [Change](#)

OMB CONTROL NUMBER: 2577-0274
EXPIRATION DATE: 03/31/2015

[5-Year Action Plan](#) [Annual Statement/Budget/P&E](#)

AS3 » Activity List for Annual Statement/Budget

Piggy Bank		
AS Amount	WA Planned Amount	Balance
\$100,000.00	\$200,000.00	-\$100,000.00

BLI Piggy Bank			
BLI Number	Budget Line item	Cumulative Amount	Percentage

Legend

AS » Annual Statement/Budget

WA » Work Activity

» Edit Activity

» Remove Activity

» New Work Activity

» Modified Work Activity

Annual Statement/Budget Information

1. Title: 2015 Formula Grant

2. Fiscal Year End: 06/30

3. Fiscal Year: 2015

Grant/Award Information:

4. Award Number: Not Associated to Award.

5. Cost: \$100,000.00

Work Activities

Identifier	Activity	Amount	Options
ID0004	Roof installation	\$200,000.00	

Import Work Activities

←

Figure 33: Activity List Page for Annual Statement/Budget – Import Work Activities Button

Upon selecting Import Work Activities, the user is directed to the Add Activities to the Annual Statement/Budget Page. On this page, work activities included in the 5YAP for different years are displayed. The user may select from among these activities and add them to Budget by using the Add Work Activities link. Users may want to use this functionality if the PHA has had a change of plans and would like to complete the activities included in the 5YAP in a different order, shifting some activities between years.



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[5-Year Action Plan](#) [Annual Statement/Budget/P&E](#)

Selected PHA: [Change](#)

OMB CONTROL NUMBER: 2577-0274
EXPIRATION DATE: 03/31/2015

AS8 » Add Activities to Annual Statement/Budget

Note that work activities imported into this Annual Statement/Budget using this function will be moved from their current year into the year of this Annual Statement/Budget.

Select one of the work activities from the list below to import the work activity into the Annual Statement/Budget.

Piggy Bank

AS Amount	WA Planned Amount	Balance
\$100,000.00	\$400,000.00	~\$300,000.00

Work Activities				
	Identifier	Activity	Amount	Year
<input type="checkbox"/>	ID0001	Roof installation	\$180,000.00	2014
<input type="checkbox"/>	ID0002	Admin	\$20,000.00	2014
<input checked="" type="checkbox"/>	ID0005	Roof installation	\$200,000.00	2016
<input type="checkbox"/>	ID0006	Roof installation	\$200,000.00	2017

Add Work Activities
Cancel

Figure 34: Add Activities to Budget

1.2.3 Edit Work Activities

Once work activities have been added to the Budget, users can click on Edit option next to an activity on the Activity List for Annual Statement/Budget Page to edit the work activity.

AS4 » Work Activity Details

[Go back to Work Activity Listing](#)

Piggy Bank

AS Amount	WA Planned Amount	Balance
\$100,000.00	\$250,000.00	-\$150,000.00

Work Activity Information

1. Title:

2. Description:

Installed roof

3. Cost:

4. Development/AMP:

Budget Line Item Information [\(Click to Expand\)](#)

Component Categories from PNA [\(Click to Expand\)](#)

Work Categories [\(Click to Expand\)](#)

Other Measures [\(Click to Expand\)](#)

Save
Cancel

Figure 35: Work Activity Details Page



The Work Activity Details page displays the following information on the work activity, some of which may be edited.

- **Work Activity Information:** Users may wish to edit certain elements of the work activity, such as the cost, and may do so using this functionality.
- **Budget Line Item Information:** Users may select the option to expand the Budget Line Item Information section. However, as BLIs will be automatically set by Work Category selections, users do not need to enter BLI information. The total of Budget Line Item costs provided in Budget Line Item Information section should match the Cost identified under Work Activity Information.

Budget Line Item Information (Click to Expand)	
5. Budget Line Item Information:	
1406 » Operations	<input type="text" value="\$0.00"/>
1408 » Management Improvements	<input type="text" value="\$0.00"/>
1410 » Administration	<input type="text" value="\$0.00"/>
1480 » General Capital Fund	<input type="text" value="\$0.00"/>
1492 » Moving to Work Demonstration	<input type="text" value="\$0.00"/>
1501 » Collateralization or Debt Service paid by the PHA	<input type="text" value="\$0.00"/>
1503 » RAD-CFP	<input type="text" value="\$0.00"/>
9000 » Collateralization or Debt Service paid Via System of Direct Payment	<input type="text" value="\$0.00"/>
Original Obligation End Date and Original Expenditure End Date are Required when line items 1501 or 9000 is available	
6. Projected Obligation End Date: <small>Example: 01/01/2010</small>	<input type="text"/>
7. Projected Expenditure End Date: <small>Example: 01/01/2010</small>	<input type="text"/>

Figure 36: Edit Work Activities in Annual Statement/Budget – Expanded View of BLI Information

- **Component Categories from PNA:** This functionality is not yet available.
- **Work Categories:** PIH Notice 2016-21 (see: <http://portal.hud.gov/hudportal/documents/huddoc?id=PIH-2016-21.pdf>) provides information on editing this section. PHA users may update the work sub-categories selected upon creation of the Work Activity in the 5-Year Action Plan. It is permissible to check or un-check sub-categories to reflect a change in the scope of a work activity; for example, if an approved work activity originally included “Roofs”, “Gutters -



Downspouts”, and “Soffits”, the user may un-check the sub-category for “Gutters - Downspouts” during the creation of the Budget to reflect a reduction in the scope of the work. However, users may not check or un-check work sub-categories if the changes would be inconsistent with the description of the approved work activity; for example, for a roof replacement work activity, a PHA may not un-check “Roofs, “Gutters - Downspouts”, and “Soffits” and check “Exterior Lighting”. In this latter case, the user would need to return to the 5-Year Action Plan to add or edit work activities and receive Field Office approval before adding the work items to a Budget.

- **Other Measures:** Users may select the option to expand the Other Measures section. In this section, users may enter information on whether or not the work item has accessible features built in, security costs, energy/water conservation components, or lead based paint components. In accordance with PIH Notice 2016-21 (see: <http://portal.hud.gov/hudportal/documents/huddoc?id=PIH-2016-21.pdf>), this section is not mandatory at this time.

Other Measures (Click to Expand)	
10. Other Measures:	
Other Measure Detail	Estimated Cost
<input type="checkbox"/> Section 504/other accessibility measure	<input type="text"/>
<input type="checkbox"/> Security - Hard Costs	<input type="text"/>
<input type="checkbox"/> Security - Soft Costs	<input type="text"/>
<input type="checkbox"/> energy/water conservation measure	<input type="text"/>
<input type="checkbox"/> lead based paint related measure	<input type="text"/>

Figure 37: Edit Work Activities in Annual Statement/Budget – Expanded View of Other Measures

Once all work activity information has been edit or updated, the user selects the Save button. The user will then be directed to the Activity List for Annual Statement/Budget Page. On this page, the BLI Piggy Bank will appear.



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5-Year Action Plan Annual Statement/Budget/P&E Selected PHA: Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 03/31/2015

AS3 » Activity List for Annual Statement/Budget

AS Amount	WA Planned Amount	Balance
\$100,000.00	\$100,000.00	\$0.00

BLI Number	Budget Line item	Cumulative Amount	Percentage
1480	General Capital Fund	\$100,000.00	100%

Legend

AS » Annual Statement/Budget

WA » Work Activity

» Edit Activity

» Remove Activity

» New Work Activity

» Modified Work Activity

Annual Statement/Budget Information

1. Title: 2015 Formula Grant

2. Fiscal Year End: 06/30

3. Fiscal Year: 2015

Grant/Award Information:

4. Award Number: Not Associated to Award.

5. Cost: \$100,000.00

Work Activities

Identifier	Activity	Amount	Options
ID0004	Roof installation	\$50,000.00	✖
ID0005	Roof installation	\$50,000.00	✖

Figure 38: Activity List for Annual Statement/Budget

On the bottom of the Activity List for Annual Statement/Budget Page, the user may select Save Report at any time to save the report as a draft. Selecting Save Report returns the user to the Annual Statement/Budget Reporting Page.

1.2.4 Assign Annual Statement/Budget to an Award

On the Annual Statement/Budget Reporting page, users can click on the “Assign to Award” icon next to a Budget to associate a Budget with an Award. The Assign to Award icon looks like this:



Icon 6: Assign to Award Icon



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5-Year Action Plan • Annual Statement/Budget/P&E

Selected PHA: [Change](#) OMB CONTROL NUMBER: 2577-0274
EXPIRATION DATE: 03/31/2015

AS1 » Annual Statement/Budget Reporting

This page lists the awards for which Annual Statements/Budget are created. This page also allows users to create new Annual Statements/Budget.

Awards with Annual Statements/Budget

This section displays the awards that have Annual Statements/Budget.

Please enter search criteria. A cumulative search is performed including all parameters provided.

Award Number:

Award Year:

[Clear Search Results](#)

Awards with Annual Statements/Budget List

Award Year	Award ID	Award Amount (HUD Obligation)	Annual Statement/Budget
No awards found.			

Annual Statements/Budget not associated with Awards

This table lists all the annual statements/Budget that are not associated with an award. Click on 'Assign to Award' link to associate corresponding annual statement/Budget with an award.

Annual Statements/Budget not associated with Awards List

Show entries

Search:

Title	Create Date	Last Modified	Report Year	Status	Options
2015 Formula Grant	07/10/2015	07/10/2015	2015	Draft	
2014 Formula Grant	07/10/2015	07/10/2015	2014	Draft	

Figure 39: Annual Statement/Budget Reporting – Assign to Award Icon

Upon selecting the Assign to Award icon, the Associate Annual Statement/Budget with Award page is displayed. The user can select the radio button for the award and then click the Complete button to assign an award to the Budget.

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Home - Core Activity/Energy Module - Development of New Housing - Activity Planning - EPC - PNA - User and Group Tools

5-Year Action Plan • Annual Statement/Budget/P&E

Selected PHA: [Change](#) OMB CONTROL NUMBER: 2577-0274
EXPIRATION DATE: 03/31/2015

AS7 » Associate Annual Statement/Budget with Award

Select one of the Awards from the list below to associate to the Annual Statement/Budget. This process will update the Annual Statement/Budget estimated amount to reflect the amount of the Award.

Piggy Bank

AS Amount	WA Planned Amount	Balance
\$50,000.00	\$50,000.00	\$0.00

List of Awards

Select	Award ID	Amount
<input checked="" type="radio"/>	0114	\$95,052.00

Figure 40: Associate Annual Statement/Budget with Award



Upon selecting a grant award and selecting Complete, the user will be returned to the Annual Statement/Budget Reporting Page. The Budget that is newly linked to a grant award will no longer be displayed on the right side of the screen in the table for “Annual Statements/Budget not associated with Awards”. However, the Budget will now be displayed on the left side of the screen in the table for “Awards with Annual Statements/Budget List”.

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Home - Core Activity/Energy Module - Development of New Housing - **Activity Planning** - EPC - PNA - User and Group Tools

5-Year Action Plan • **Annual Statement/Budget/P&E** Selected PHA: Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 03/31/2015

AS1 » Annual Statement/Budget Reporting

This page lists the awards for which Annual Statements/Budget are created. This page also allows users to create new Annual Statements/Budget.

Awards with Annual Statements/Budget

This section displays the awards that have Annual Statements/Budget.

Please enter search criteria. A cumulative search is performed including all parameters provided.

Award Number:

Award Year:

[Clear Search Results](#)

Awards with Annual Statements/Budget List

Award Year	Award ID	Award Amount (HUD Obligation)	Annual Statement/Budget
2014	50114	\$95,052.00	Edit

Annual Statements/Budget not associated with Awards

This table lists all the annual statements/Budget that are not associated with an award. Click on 'Assign to Award' link to associate corresponding annual statement/Budget with an award.

Annual Statements/Budget not associated with Awards List

Show entries Search:

Title	Create Date	Last Modified	Report Year	Status	Options
2015 Formula Grant	07/10/2015	07/10/2015	2015	Draft	Assign to Award Delete Refresh Add

Showing 1 to 1 of 1 entries [Previous](#) [Next](#)

Figure 41: Annual Statement/Budget Reporting Page – Annual Statement/Budget Associated with Award

If the estimated amount record in the Budget differs from the grant award amount, the user will need to make corrections. To do so, the user clicks the Edit link next to the award in the table for Awards with Annual Statements/Budget list.

The user will be directed to the Annual Statements/Budget List Page for the specific award. The user will then select “Edit Statement”. The user may then edit and import work activities as previously described.



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5-Year Action Plan Annual Statement/Budget/P&E Selected PHA: Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 03/31/2015

AS2 » Annual Statements/Budget List » 50114

Legend

- This statement has been submitted and cannot be edited
- Revise the current statement (copies the statement)
- Edit the statement (does not copy the statement)
- Submitted as final P&E
- Delete
- Create P&E Report
- View PDF

Annual Statements/Budget

Show 10 entries Search:

Statement	Created Date	Last Modified	Report Year	Status	Options
(DRAFT) Annual Statement/Budget Original	07/10/2015	07/10/2015	2014	Draft	Edit Statement Delete Statement View PDF

Showing 1 to 1 of 1 entries

Previous Next

Figure 42: Annual Statement/Budget List for a Grant Award

1.2.5 Submit Report

Once the Budget has been linked to a grant award, the Piggy Bank balances out (i.e., Annual Statement/Budget Amount is equal to Work Activity Planned Amount and Balance is \$0.00) and the BLI Piggy Bank indicates the BLI amounts also match (i.e., Percentage is equal to 100%), a Submit Report button will appear at the bottom of the Activity List for Annual Statement/Budget Page. The user may then select Submit Report to submit the Budget to HUD.



AS3 » Activity List for Annual Statement/Budget

[Go back to Statement Listing](#)

Piggy Bank

AS Amount	WA Planned Amount	Balance
\$95,052.00	\$95,052.00	\$0.00

BLI Piggy Bank

BLI Number	Budget Line item	Cumulative Amount	Percentage
1480	General Capital Fund	\$95,052.00	100%

Legend

AS » Annual Statement/Budget

WA » Work Activity

» Edit Activity

» Remove Activity

» New Work Activity

» Modified Work Activity

Annual Statement/Budget Information

1. Title: 2014 Formula Grant

2. Fiscal Year End: 06/30

3. Fiscal Year: 2014

Grant/Award Information:

4. Award Number: 50114

5. Cost: \$95,052.00

Work Activities

Identifier	Activity	Amount	Options
ID0001	Roof installation	\$50,000.00	
ID0006	Roof installation	\$45,052.00	

[Import Work Activities](#)

Finished with all work activities?

If you are done entering all work activities for this Award, Submit your Annual Statement/Budget and lock the report. If you are not yet done, select "Save Report" to save annual statement/Budget as draft. Use the View PDF link to inspect the report prior to submission.

[View PDF](#)

[Save Report](#) [Submit Report](#)

Figure 43: Submit Annual Statement/Budget Report

Upon selecting “Submit Report”, the user will receive a popup message.

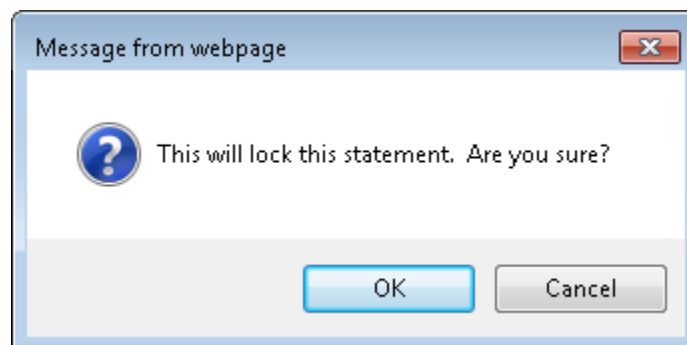


Figure 44: Submit Budget Confirmation

Upon selecting OK, the user will be directed to the Annual Statements/Budget List page for the grant award and the Budget will be displayed with a lock icon and a status of “Submitted”.



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Home - Core Activity/Energy Module - Development of New Housing - Activity Planning - EPC - PNA - User and Group Tools

5-Year Action Plan • **Annual Statement/Budget/P&E**

Selected PHA: [REDACTED] Change OMB CONTROL NUMBER: 2577-0274 EXPIRATION DATE: 03/31/2015

AS2 » Annual Statements/Budget List » [REDACTED] 50114

Legend

- This statement has been submitted and cannot be edited
- Revise the current statement (copies the statement)
- Edit the statement (does not copy the statement)
- Submitted as final P&E
- Delete
- Create P&E Report
- View PDF

Annual Statements/Budget

Show 10 entries Search: [REDACTED]

Statement	Created Date	Last Modified	Report Year	Status	Options
Annual Statement/Budget Original	07/10/2015	07/10/2015	2014	Submitted	View PDF Unsubmit Statement Revise Statement Create New P&E Report

Showing 1 to 1 of 1 entries

Previous Next

Figure 45: Annual Statement/Budget List for Grant Award - Status Submitted

Users may select the Budget link in the table to return to the Activity List for Annual Statement/Budget Page. For submitted reports, the information is Read-Only.

AS3 » Activity List for Annual Statement/Budget

[Go back to Statement Listing](#)

Piggy Bank

AS Amount	WA Planned Amount	Balance
\$95,052.00	\$95,052.00	\$0.00

BLI Piggy Bank

BLI Number	Budget Line item	Cumulative Amount	Percentage
1480	General Capital Fund	\$95,052.00	100%

Legend

AS » Annual Statement/Budget

WA » Work Activity

- Edit Activity
- Remove Activity
- New Work Activity
- Modified Work Activity

This Annual Statement/Budget is READ-ONLY
This Annual Statement/Budget has already been submitted and is currently read only. This means that you cannot make edits to this statement.

Annual Statement/Budget Information

1. Title: 2014 Formula Grant

2. Fiscal Year End: 06/30

3. Fiscal Year: 2014

Grant/Award Information:

4. Award Number: 250114

5. Cost: \$95,052.00

Work Activities

Identifier	Activity	Amount
ID0001	Roof installation	\$50,000.00
ID0006	Roof installation	\$45,052.00

Figure 46: Activity List for Annual Statement/Budget Report – Read-Only for Submitted Reports



If a user needs to edit the information in the submitted report, the user should follow the instructions below.

1.2.6 Edit/Revise an Annual Statement Report

From the Annual Statements/Budget List page for the grant award, the user may select the appropriate link in the Options column of the table to view a PDF of the Budget, Un-submit a Budget or Revise a Budget.

When a user revises a submitted Budget, a copy of the submitted Budget is created as latest version. The revised report will be marked with a revision number. Users may revise submitted Budgets to further report any additional work activities performed under the award or edit already-reported work activities in previously-submitted Budgets.

Energy and Performance Information Center (EPIC)
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Home | Core Activity/Energy Module | Development of New Housing | Activity Planning | EPC | PNA | User and Group Tools

5-Year Action Plan | Annual Statement/Budget/P&E | Selected PHA: [] | Change | OMB CONTROL NUMBER: 2577-0274 | EXPIRATION DATE: 03/31/2015

AS2 » Annual Statements/Budget List » 50114

Legend

- This statement has been submitted and cannot be edited
- Revise the current statement (copies the statement)
- Edit the statement (does not copy the statement)
- Submitted as final P&E
- Delete
- Create P&E Report
- View PDF

Annual Statements/Budget

Show 10 entries

Statement	Created Date	Last Modified	Report Year	Status	Options
Annual Statement/Budget Original	07/10/2015	07/10/2015	2014	Submitted	View PDF
Annual Statement/Budget Rev. 1	07/10/2015	07/10/2015	2014	Submitted	View PDF Unsubmit Statement Revise Statement Create New P&E Report

Showing 1 to 2 of 2 entries

Previous Next

Figure 47: Annual Statement/Budget List – Displaying Revised Report

1.2.7 Performance and Evaluation Report

While EPIC's Activity Planning Module automates the development, submission, approval, and revision of CFP 5-Year Action Plans, Budgets and Performance & Evaluation (P&E) Reports, this user manual currently provides technical instructions only on utilizing EPIC's 5-Year Action Plan and Budget functionality. According to PIH Notice 2016-21 (see: <http://portal.hud.gov/hudportal/documents/huddoc?id=PIH-2016-21.pdf>), HUD is reviewing the P&E Report functionality and is not moving to electronic submissions of P&E Reports within EPIC at this time.



1.3 Appendix A: Acronyms

Table 1 below provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

Table 1: Appendix A – Acronyms

Acronym	Definition
APM	Activity Planning Module (of EPIC)
BLI	Budget Line Item
EPIC	Energy and Performance Information Center
FO	Field Office
HUD	U.S. Department of Housing and Urban Development
LOCCS	Line of Credit Control System
P&E	Performance and Evaluation
PHA	Public Housing Authority
PIH	Public and Indian Housing
5YAP	5-Year Action Plan
PNA	Physical Needs Assessment